



## Memorandum

**To:** Anne Teresa, FSA

**From:** Howard Weitzner, Accenture

**Date:** August 31, 2002

**Subject:** Deliverable 95.2.1a Training Services Summary

### **Purpose**

This memo summarizes the results of Training and Organizational Development Services provided to FSA University during the period August 1 – August 31, 2002. The results were delivered through supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services, processes and systems.

### **Initiatives this Period**

Specific initiatives addressed during this period included:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Training development team support
- Delivery cost analysis tool
- Performance consultant
- Resource planning
- LMS support
- Human Resources support
- Virtual Classroom

### **Planned Initiatives**

During the period September 1 – September 30, 2002, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- Training development team support
- Delivery cost analysis tool
- Performance consultant
- Resource planning
- LMS support
- Human Resources support
- Virtual Classroom

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**Description of Initiatives**

***FSA University strategic planning and organization development***

Underlying several initiatives is ongoing support for FSA University's efforts to develop and enhance its organizational effectiveness. Activities continue to focus on aligning FSA University's activities with the strategic goals of the organization. Ongoing support continues to be provided to help FSAU segment its dual roles as service provider and integrator/advisor. Activities this period focused on helping FSA to articulate to ED leadership what are FSA's lines of business and the value provided by FSA to the organization. During an all day meeting, ideas and actions were identified to assist FSAU lead the change associated with One-ED and begin establishment of FSAU's point-of-view regarding workforce development for ED at-large.

***Training Development And Delivery Methodology/Process Team***

The Training Development and Delivery team supports the creation and implementation of best practices for how FSA University develops and delivers training. The methodology (Plan, Design, Build, Deliver, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team reviewed the final materials formatted by FSA University Communications. The team provided input regarding font size, graphics, etc. Additionally, the team met with Anita Gross to discuss content related suggestions and final packaging of the materials. The process materials will be featured on the FSA University website as a product/service and provided to all training development team leads.

Specific activities during this period included:

- Review of FSA University Communications formatted process materials
- Further development of the deployment and packaging strategy for the training process
- Training development team coaching

The next phases of work may include:

- Packaging of materials for use by training teams
- Development of workshop for training team leads
- Continued deployment of process and corresponding materials

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***Training Development Team Support***

Representatives of the Training Process Team serve as coaches to training development team leads. In this capacity, coaches assist team leads with project planning and management, creation of meeting agendas, and facilitation of team gatherings. Through this, coaches educate team leads on the training process itself, including both instructional design and project management elements.

Teams currently working with coaches include:

***Delivery System training***

- The Delivery System team, led by Linda Burkhardt, conducted its instructional strategy session in August. During this gathering, NCS reviewed the high-level content outline with Linda and her team. The team then created storyboards depicting the instructional strategies for the course(s). Katie Malague, the team's process coach, attended these sessions to assist with process-related elements of determining the instructional strategies. The team's next steps include arranging for appropriate content reviews by sponsors and stakeholders, building course materials, and formalizing logistical considerations for the course.

***FFEL / Direct Loan / Perkins training***

- The training effort is underway to clear confusion among FFEL, Direct Loan, and Perkins loan programs. The team, led by Pennie Summers, will enhance interactivity on existing Direct Loan training materials for the Debt Collections office in Atlanta. During this period, the sponsors and stakeholders approved training request form, allowing the effort to move forward. The team will soon complete the Plan phase, finalizing the project completion date as September 30.

***Delivery Cost Analysis Tool***

The cost analysis team has developed a Cost Analysis Tool (CAT) to facilitate the gathering and analysis of training cost data. This information will be used to reduce costs and optimize efficiency of future training teams. The CAT tool adheres to the FSA University operating model: Plan, Design, Build, Deliver, and Assess. During this performance period, the team focused on the Assess phase. Information from Tools for Ensuring Program Integrity training (TEPI) was gathered and entered into the tool. This effort exhibits progress and improvements from the FMT process. Next month, the team should conduct a celebration and lessons learned session. Ad hoc support will continue to be provided as the FSA finance team uses the tool:

Activities during this period included:

- Supported collection of Fiscal Management Training (FMT) cost and time data
- Collected Tools for Ensuring Program Integrity training (TEPI) data

Specific activities in the next period may include:

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- Work with Training Process team to define possible role of CAT in the process
- Collect assumption data for Tools for Ensuring Program Integrity training (TEPI)
- Introduce the CAT tool to training team leads, as training teams are kicked-off
- Assess tool version 1.3 success and revise approach
- Conduct CAT team celebration/lessons learned session

### ***Performance Consultant***

During this period, the performance consultant team honed its list of “assignments.” Three categories now outline the effort: Lead, Performance Consultant, and “Adjunct Faculty.” While all FSAU staff members serve as points of contact who share opportunities with performance consultants, these three categories indicate roles within the process that assigned individuals perform. Leads serve as contact to channels and units, based on existing relationships and knowledge of the unit to which they are assigned. Performance consultants, often informed of opportunities through the leads, conduct needs assessments, determine approaches, and broker solutions for the customer. “Adjunct faculty” denotes representatives from channels, units, or operating partners who serve as resources for requests or performance needs.

The team also created a description of the performance consultant effort, as a part of completion of its scorecard. As part of this effort, the team created an illustration of the process involved in approving a proposal through completion of a project. In effect, this documents the overlaps and intersections among several efforts and supports the Review Board in properly responding to and securing opportunities to provide services to the organization.

### ***Resource Planning***

The Resource Planning Initiative focused on further defining and clarifying the resource planning process. In addition, the team continued to work with the FSAU Team Lead to develop the processes and provided coaching on the roll out strategy. Other activities included:

- Modified and updated Resource Planning Presentation
- Combined Resource Planning presentation and Homeroom concept presentation to provide a coherent, unified explanation to sponsors and stakeholders
- Continued efforts to coordinate resource planning tools and processes with the Review Board processes

### ***LMS Support***

With the LMS operational, FSA University Services personnel have assumed responsibility for the day-to-day training and system administration. As questions and issues have been

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raised, ad-hoc support in the areas of reporting, usability and security have been provided. Dedicated support has been provided this period to prepare the LMS team and implement changes required for the Financial Partners LaRS training registration. Specific activities have focused on creation of animated videos with audio voice-over (Robodemos) on how to use the LMS and customizations to the login, welcome and reports. These modifications have been completed and FSA University will continue to operate the LMS with these modifications. This deliverable includes a sample Robodemo explaining the full registration process. The following are a complete list of all Robodemos created and delivered to FSAU, along with the backup files:

- Complete Registration process with audio
- Complete Registration process without audio
- Registration process with audio beginning from LMS Welcome screen
- Registration process without audio beginning from LMS Welcome screen
- Registration process with audio beginning from LMS Course Abstract screen
- Registration process without audio beginning from LMS Course Abstract screen
- Registration process with audio beginning from LMS Facility and Location screens
- Registration process without audio beginning from LMS Facility and Location screens

### ***Human Resources Support***

In this period, the homeroom concept was joined with the resource planning presentation to provide a coherent overview to sponsors and stakeholders. Coordinating this effort with existing and newly developed FSAU processes will benefit and enhance these initiatives.

Work continues in the performance planning or "Line of Sight" activity. To ensure that FSAU is appropriately aligning its performance goals with the Administration's expectations, this activity will demonstrate the direct correlation between performance objectives in the President's Management Agenda and those of the Department of Education, FSA, and FSAU.

### **Observations/Recommendations**

During the period August 1 – August 31, the following observations were identified and will be reviewed to determine the potential impact and value for FSA University:

- Training development team leads can utilize the training development process as both an instructional design tool and a project management tool. Through following the process steps, such as emphasizing the importance of completing evaluations, submitting registration sheets, etc., team leads increase the likelihood of success of the training program.
- Clear and concise communication is critical to the success of training projects, both in keeping sponsors and stakeholders informed of progress and in involving team members in development.

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- Full-time (or nearly full-time) involvement of team members on development teams benefits their ability to make a significant contribution to the team. The resource planning effort will enable FSAU to manage this practice.

In the past several periods the following observations/recommendations have been included in the monthly training services summary. These items are included again to reiterate the potential value and impact for FSA University:

- FSAU should create a standard form to accompany training task orders. This standard form should be consistent with the training process and cost analysis requirements. For example, it should require operating partners to split their development and delivery efforts.
- It is advisable to integrate processes across teams. Specifically, training teams would benefit from involving the cost analysis efforts in their initial planning to determine budgeting for their project(s).
- Employees could benefit from the establishment of clear expectations, both within a given role and over the course of a career. A curriculum or overall training program could be designed to offer guidelines and suggestions for training at certain levels, enabling employees to develop skills and map progress. One element of this could be the re-activation of the individual development plan, created in cooperation between employees and their managers.

**Attachments:**

- Training Development Team Support
  - Sample kick-off meeting agenda
  - EDEExpress Basic and Application Processing planning session agenda
- Performance Consultant
  - Performance consultant draft "assignments"
  - Performance consultant overview and scorecard
  - Proposal to project lifecycle
- Resource Planning
  - Resource planning overview – "Focusing on the People"
- LMS Support
  - LMS registration video (**Full video included in electronic deliverable only**)